SOPHTLOGIC

PRC - Posting Amendments
Build 2059
User Manual

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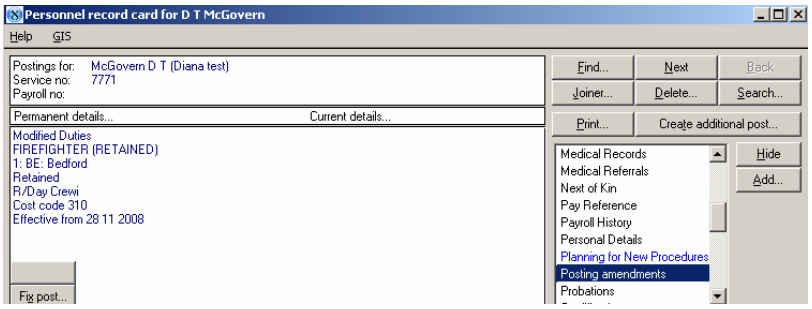
Posting Amendments

All changes to a person's Service History should be done within a <u>Posting Amendment</u>. This keeps a historical record of every posting and change thereof for that person.

Changing a Posting Amendment

Acting Up

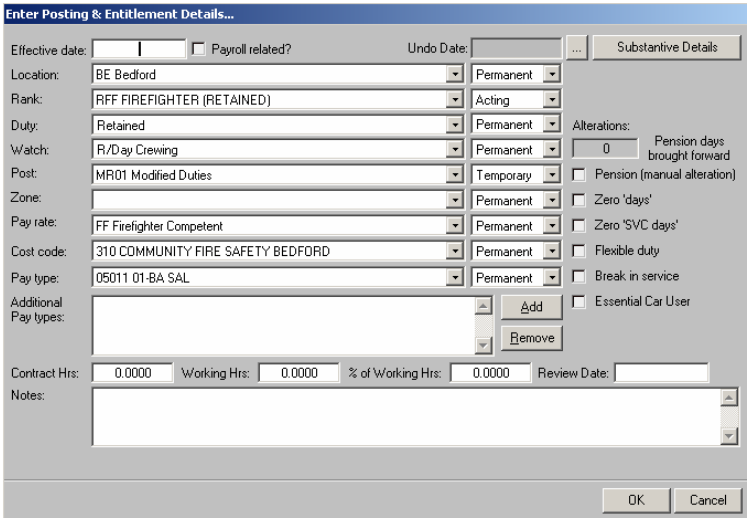
If you have a Fire Fighter who is going to be 'Acting Up' for more that 28 days you will need to do a Temporary 'Posing Amendment' if it is less than 28 days you can set up the 'Acting Up' within the Duty Rotas Book.



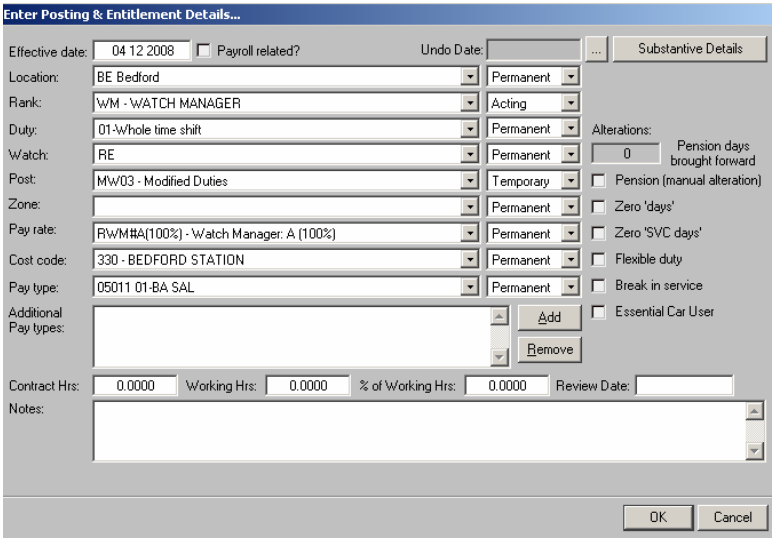
- Find the person who you are 'Acting Up'
- Click onto Posting Amendments
- Click onto the Add button

An Amendment Type dialog box will appear

- Click onto the 'Alter Posting Details'



As you can see that the present details will appear in the Posting & Entitlement Details



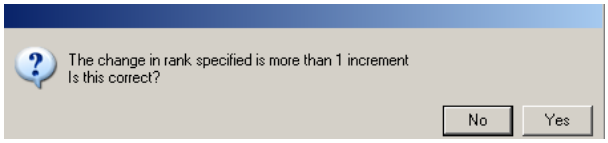
- Enter the Date the Acting Up will start
- Change the information for the Post

I have Changed - Temporary, changed Rank - Acting and Post - Temporary

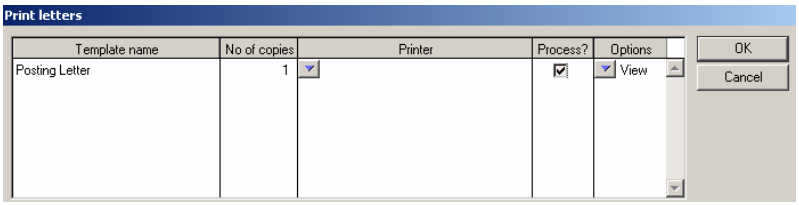
- Click onto the OK button

A dialog box may appear asking you if the change in Rank is more than one increment. If this is so

- Click onto the Yes button



The Print letter window will appear



If you do want to Print the letter

- Select a Printer
- Change the Option to Print

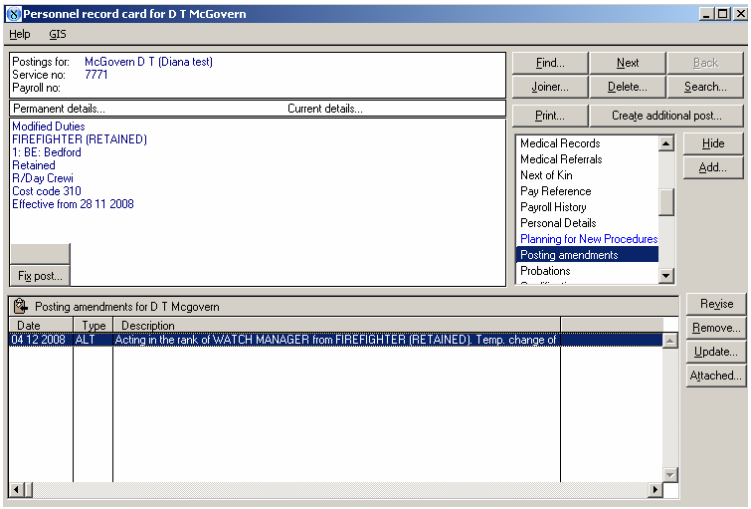
Otherwise

- Tick the Process box and leave the option in View
- Word will open then close

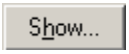
A dialog box will appear asking if this letter is correct

- Click onto the Yes button

You should now be back at the PRC



- Click onto the Show button

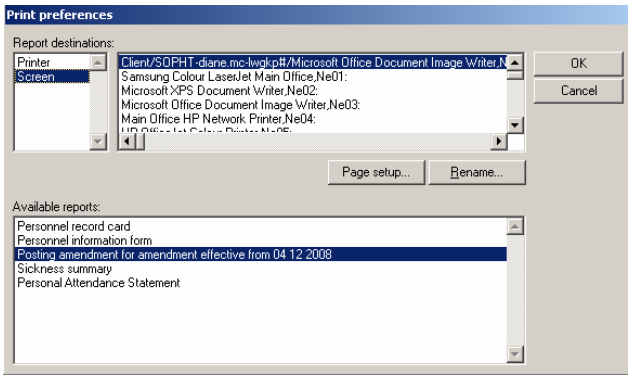


As you can see the details are in the Posting Amendment window

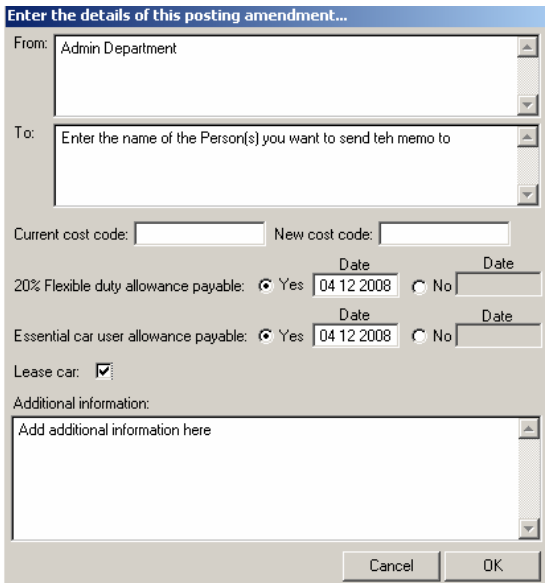
To Activate the Temporary Post

- Click onto the Posting – as shown above -
- Click onto the Print button

The Print Preference window will appear



- Choose the ‘available Report’ (letter)
- Click onto the OK button



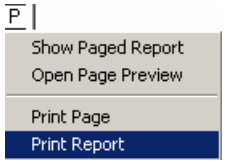
- Enter who it’s To and From
- Fill in any other relevant details
- Click onto the OK button

The Screen Report with the details of the ‘Acting Up’ will appear

Screen report
PLEASE CIRCULATE AS QUICKLY AS POSSIBLE
IN AN ENVELOPE
To:
Initials:
Date:
1. Pay section
2. Attendance Management
3. Recreation Fund
4. C F O's Secretary
5. Purchase & Supply
6. Communications Section
7. I.T. Manager
8. Document Production
9. Return to Personnel Department
Please note that the following change is effective from 04 12 2008
Acting in the rank of WATCH MANAGER from FIREFIGHTER (RETAINED). Temp. change of post to Modified Duties from Modified Duties. Perm. change of duty to 01-Whole time shift from Retained. Perm. change in watch to RE watch from R/Day Crewi watch. Change of payrate. Change of cost code to 330 from 310. Change of pay type to SAL.
Surname: McGovern
First names: Diana test
Service no: 7771
Address: dddd ddd dd dddd
Rank: RFF (FIREFIGHTER (RETAINED))
Station: BE Bedford
Division: 1
Date of birth: 10 11 1965
Date of enrolment:

If you would like to Print this page

- Click onto the P in the top right hand corner

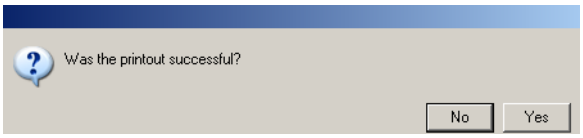


Otherwise

- Click onto the **X** in the top right hand corner

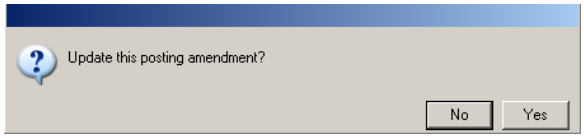
A dialog box will appear asking if the Print was successful

- Click onto the Yes button



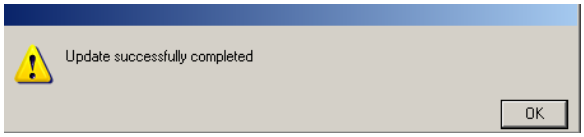
- Click onto the Update button

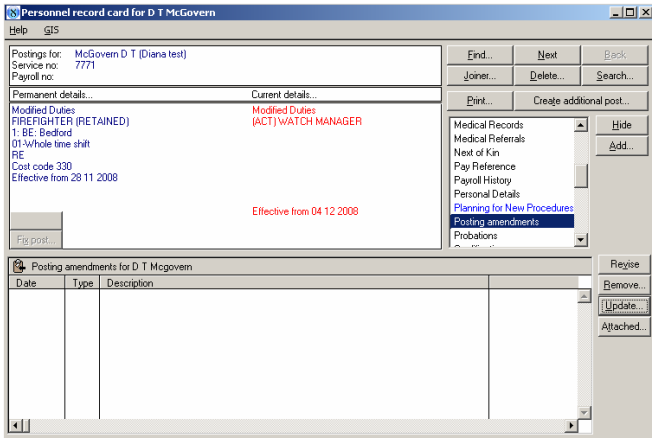
A dialog box will appear asking if you want to update the Posting Amendment



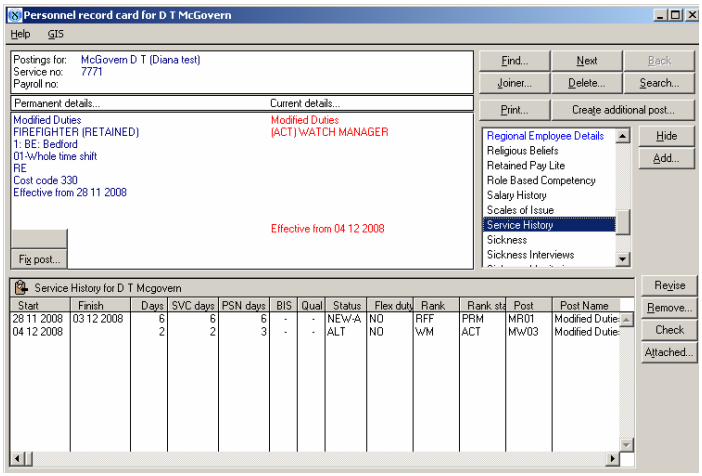
- Click onto the Yes button

Another Dialog box appears letting you know that the Update was successful.





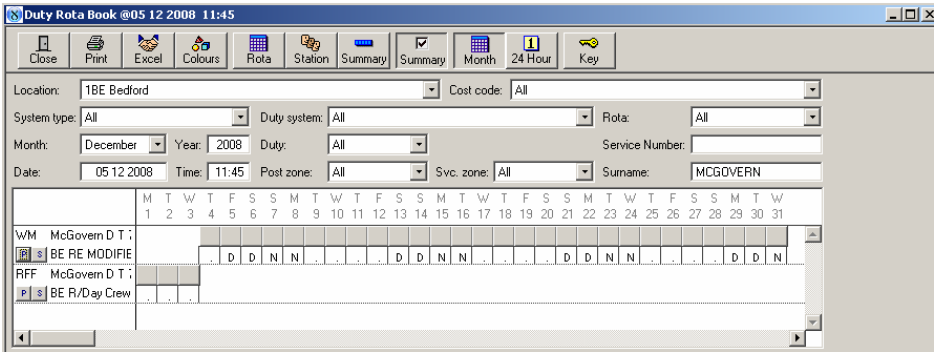
As you can see the Temporary Posting has now been entered in the PRC in Red



- Click onto the Service History submenu option

As you can see the Acting up position is showing in the Service History window as the Present Posting.

If you look in the Duty Rotas Book you will see were the last Posting ended and the new one starts.

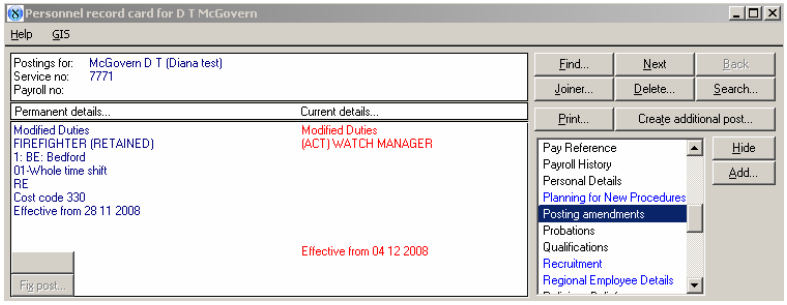


Revert to Existing Post

Once the Person; who was Acting Up or Temporary at a different Station etc, is now to returning to their original Post / Rank / Station.

- Click onto the Add button

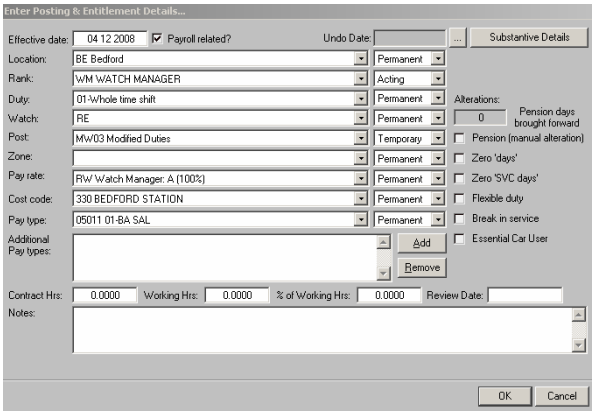
- Click onto '**Alter Posting Details'**.



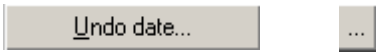
The postings window will appear with the current person's details: As Shown…

An Undo Date can be entered in order to revert this person back to their existing posting on a certain date.

This may be useful if a person is temporarily posted or seconded for a set period.

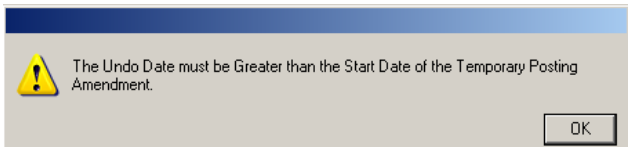


- Enter the Date the Acting Up/Temporary Duty started into the Effected Date box
- Click onto the Undo Date button



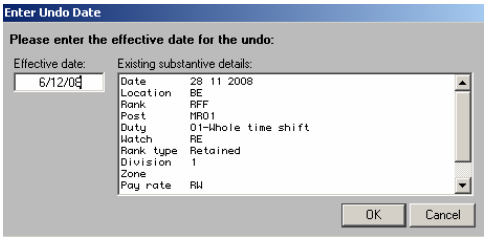
If you put in the wrong date a dialog box will appear

- Click onto the OK button



Here you would enter the date the Temporary posting ends and your original Posting Details will show

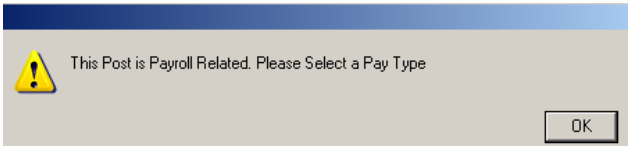
- Enter the 'Effected Date'
- Click onto the OK button



As you can see the Undo Date button now has the date that the Temporary Duty ends

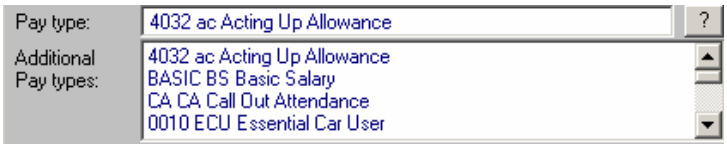
- Click onto the OK button

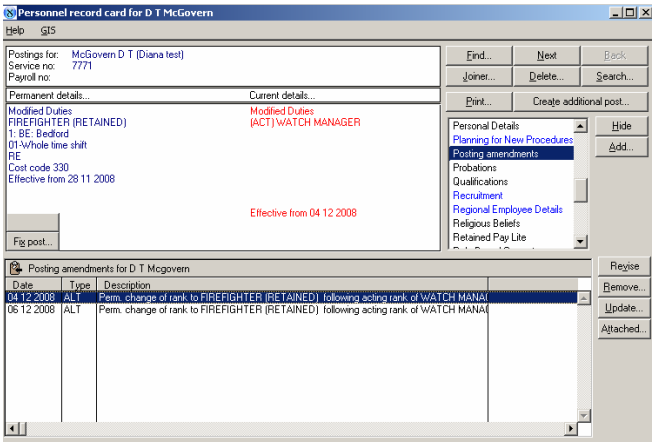
A dialog box may pop up saying the Posting may be Payroll Related if so you will need to add a Pay Type



- Click onto the OK button

- Choose the Pay Type
- Click onto the OK button


Pay type:
4032 ac Acting Up Allowance
Additional Pay types:
4032 ac Acting Up Allowance
BASIC BS Basic Salary
CA CA Call Out Attendance
0010 ECU Essential Car User

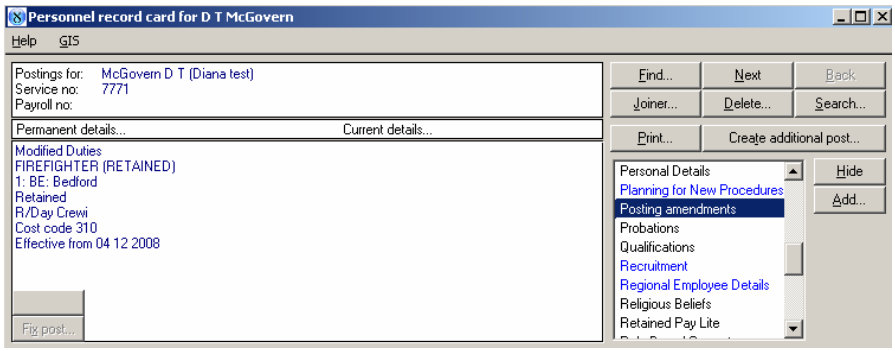


As you can see the Temporary Posting and Permanent Posting has appeared in the Posting Amendment window

- To update the Postings

- Highlight the Posting
- Click onto the Print button
- Click onto the OK button
- Click onto the OK button
- Click onto the X in the top right hand corner
- Click onto the Yes button
- Click onto the Update button
- Click onto the Yes button
- Click onto the OK button

To see the step by step instructions to update the Postings – Pg 6



As you can see the Temporary Posting Details that appeared in red have now disappeared and the Posting has gone back to the original Posting.

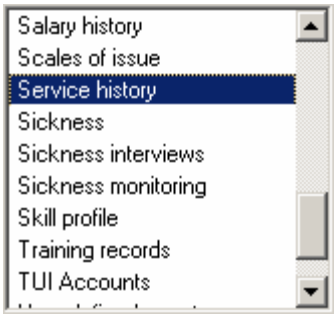
Posting Amendments have now been updated

To Check the Posting Amendment has been Successful

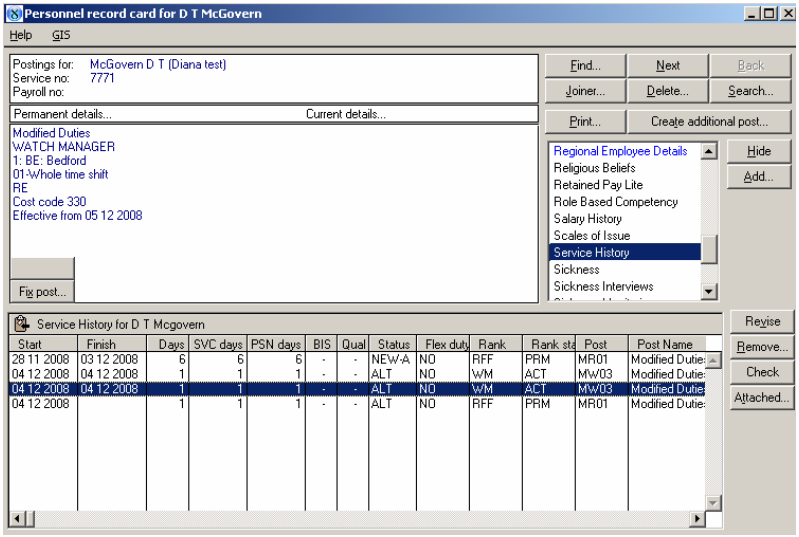
On the Personnel Record Card (PRC)

In the Sub-option,

- Click onto the Service History
- Click onto Show button



Service History window will appear

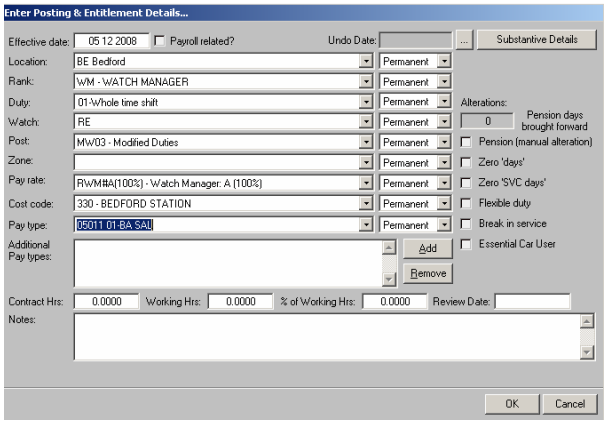

Personnel record card for D T McGovern
Help GIS
Postings for: McGovern D T (Diana test)
Service no: 7771
Payroll no:
Permanent details... Current details...
Modified Duties
WATCH MANAGER
1: BE: Bedford
01-Whole time shift
RE
Cost code 330
Effective from 05 12 2008
Fix post...
Find... Next Back
Joiner... Delete... Search...
Print... Create additional post...
Regional Employee Details
Religious Beliefs
Retained Pay Lite
Role Based Competency
Salary History
Scales of Issue
Service History
Sickness
Sickness Interviews
Hide
Add...
Service History for D T Mcgovern
Start Finish Days SVC days PSN days BIS Qual Status Flex duty Rank Rank sta Post Post Name
28 11 2008 03 12 2008 6 6 6 - - NEW-A NO RFF PRM MR01 Modified Duties
04 12 2008 04 12 2008 1 1 1 - - ALT NO WM ACT MW03 Modified Duties
04 12 2008 04 12 2008 1 1 1 - - ALT NO WM ACT MW03 Modified Duties
04 12 2008 1 1 1 - - ALT NO RFF PRM MR01 Modified Duties
Revise
Remove...
Check
Attached...

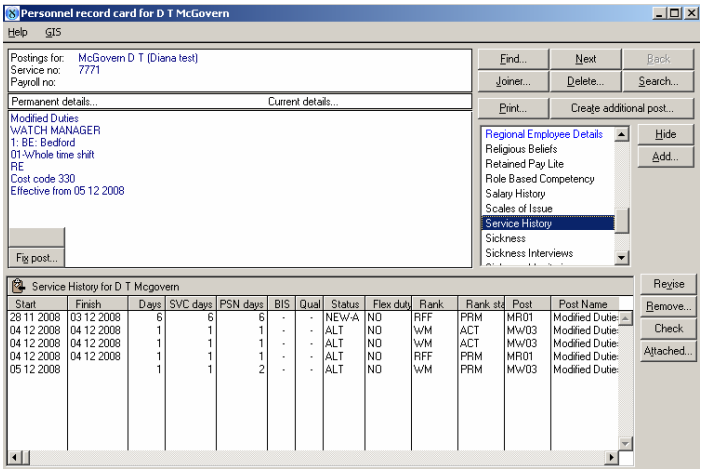
As you can see

- The Temporary Posting has been closed
- The Original Posting has been activated

Promotions

If you have a person who has been promoted, follow the exact procedure as above – as shown -



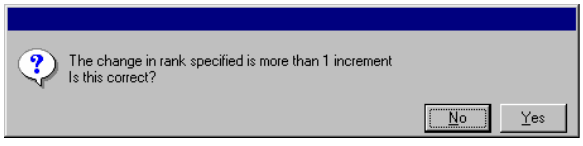

Personnel record card for D T McGovern
Help GIS
Postings for: McGovern D T (Diana test)
Service no: 7771
Payroll no:
Permanent details...
Current details...
Modified Duties
WATCH MANAGER
1: BE: Bedford
01-Whole time shift
RE
Cost code 330
Effective from 05 12 2008
Fix post...
Find...
Next
Back
Joiner...
Delete...
Search...
Print...
Create additional post...
Regional Employee Details
Religious Beliefs
Retained Pay Lite
Role Based Competency
Salary History
Scales of Issue
Service History
Sickness
Sickness Interviews
Hide
Add...
Service History for D T Mcgovern
Start Finish Days SVC days PSN days BIS Qual Status Flex duty Rank Rank sta Post Post Name
28 11 2008 03 12 2008 6 6 6 - - NEW-A NO RFF PRM MR01 Modified Duties
04 12 2008 04 12 2008 1 1 1 - - ALT NO WM ACT MW03 Modified Duties
04 12 2008 04 12 2008 1 1 1 - - ALT NO WM ACT MW03 Modified Duties
04 12 2008 04 12 2008 1 1 1 - - ALT NO RFF PRM MR01 Modified Duties
05 12 2008 1 1 2 - - ALT NO WM PRM MW03 Modified Duties
Revise
Remove...
Check
Attached...

In the PRC the Permanent Details will change

In Service History – all change to postings will appear – as shown

NOTE: If the rank is changed, there is a parameter within the system to specify how many increments a person can move. This is based on the seniority option against a Rank.

If a person is moved more than the limit in the parameter, a message will appear

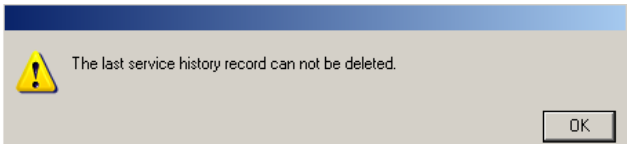


Attached Records

The Attached button against the Service History sub-option allows the user to view related data to this line which would prevent the line from being deleted.

It is recommended that you do not delete a Service History record as you may need to access it for future statistics.

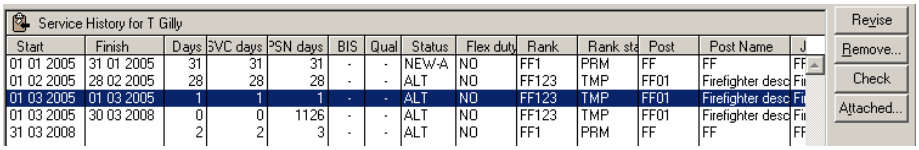
- Click onto the remove button



A dialog box – as shown – may appear.

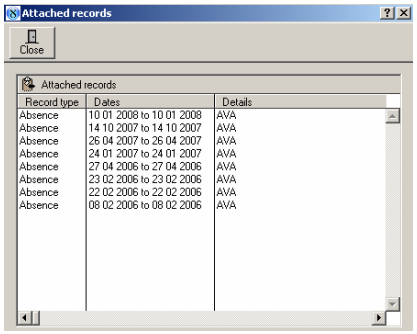
To view the attachments, linked to the record

- Highlight one of the data records


Service History for T Gilly
Start Finish Days SVC days PSN days BIS Qual Status Flex duty Rank Rank sta Post Post Name J
01 01 2005 31 01 2005 31 31 31 - - NEW-A NO FF1 PRM FF FF FF
01 02 2005 28 02 2005 28 28 28 - - ALT NO FF123 TMP FF01 Firefighter desc Fi
01 03 2005 01 03 2005 1 1 1 - - ALT NO FF123 TMP FF01 Firefighter desc Fi
01 03 2005 30 03 2008 0 0 1126 - - ALT NO FF123 TMP FF01 Firefighter desc Fi
31 03 2008 2 2 3 - - ALT NO FF1 PRM FF FF FF
Revise
Remove...
Check
Attached...

- Click onto the Attached button

A dialog box will appear, showing the amount of Absences this person had while on that Post. It will also show sicknesses etc


Attached records
Close
Attached records
Record type Dates Details
Absence 10 01 2008 to 10 01 2008 AVA
Absence 14 10 2007 to 14 10 2007 AVA
Absence 26 04 2007 to 26 04 2007 AVA
Absence 24 01 2007 to 24 01 2007 AVA
Absence 27 04 2006 to 27 04 2006 AVA
Absence 23 02 2006 to 23 02 2006 AVA
Absence 22 02 2006 to 22 02 2006 AVA
Absence 08 02 2006 to 08 02 2006 AVA

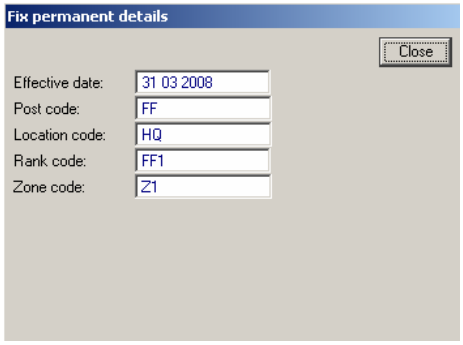
Check

Use the Check button to ensure that a person's Service History does not contain any errors. This verifies that there are no gaps in Service History.

Fix Post

This dialog box will appear showing you the fix Post

These are fixed permanent details you can't make any changes within this box – it is for viewing purposes only.



Creating a Leaver Posting Amendment

Select and highlight ‘Posting Amendments’ from the sub menu options.

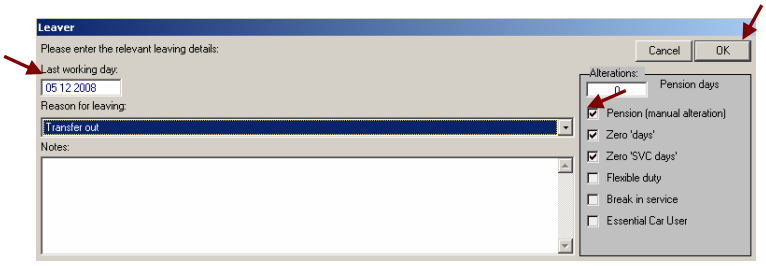
- Click the ‘Add’ button

The ‘Select an Amendment Type’ window will display, providing the user with additional options, as depicted below

- Click the ‘Leaver’ button.

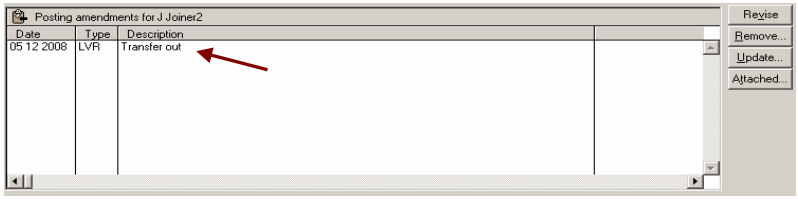
A dialog box will appear as shown

- Enter the last working day
- Click on the arrow
- Choose the reason for leaving
- Add any notes
- Click OK

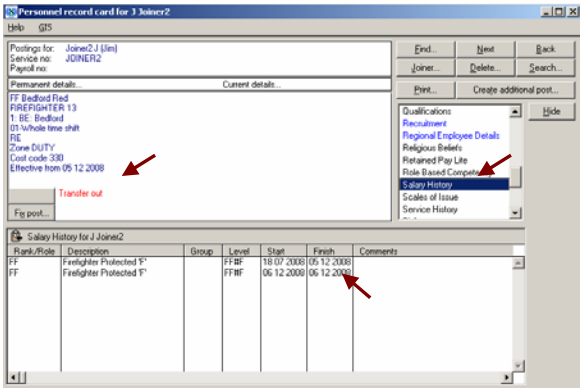


As you can see the Leave information is now entered in the ‘Posting Amendments Record’ window.

Don’t forget you need to update the Posting Amendment – (pg 6)



Click onto Posting Amendments > Click onto the Show button > Highlight the Posting > Click onto the Print button > Click onto the OK button > Click onto the OK button > Click onto the X in the top right hand corner > Click onto the Yes button > Click onto the Update button > Click onto the Yes button > Click onto the OK button.

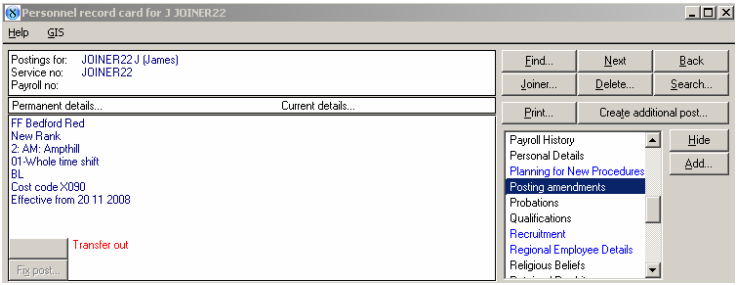


As you can see on the PRC the persons record is now closed

Rejoining a Person

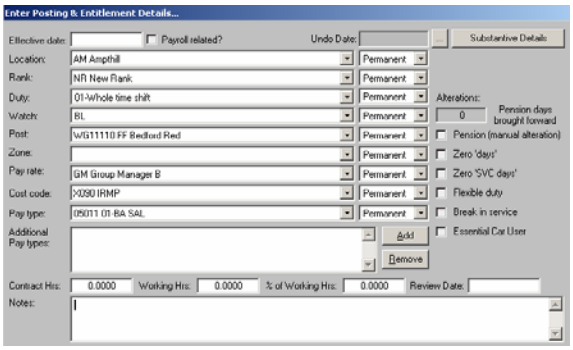
Once a person has left the service (and has a valid, updated leaver record), then it is possible to rejoin them.

- Find the Personal Record Card
- Click onto Posting Amendment

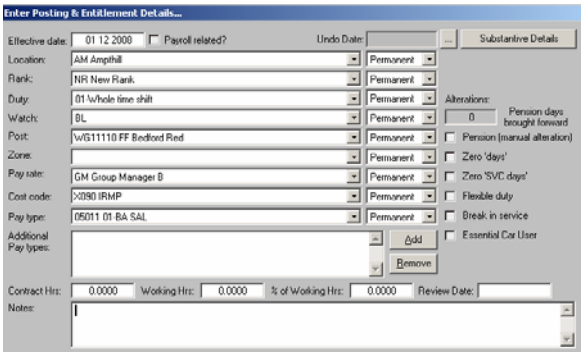


- Click onto the Add button
- Click on Re-Joined Fire Service from the posting type's window.

The selected person's last posting details before they left will appear.



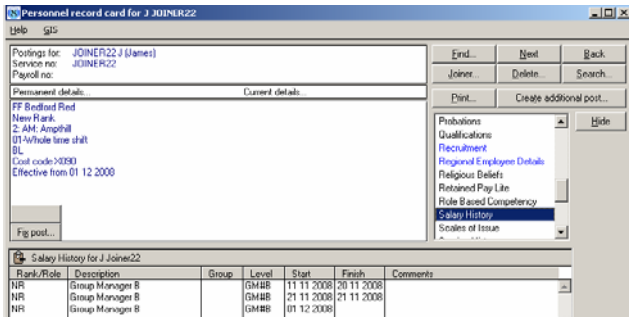
- Enter the date in the effective Date box
- Change any of the boxes
- You will need to enter a Pay Type
- Click onto the OK button



Update you Posting Amendment – (pg 6)

The 'Transfer Out' that was in red has disappeared – making him Active

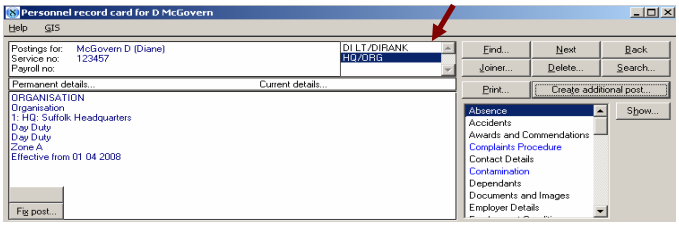
In the Service History the Posting Amendment has been added



The Additional Post Functionality

Additional Post allows for a person to have more than one current Post, without the need to have a separate Personnel Record Card (PRC).

If a person has more than one Post, the PRC will display both of the Posts in a list against the person's main details: as shown below

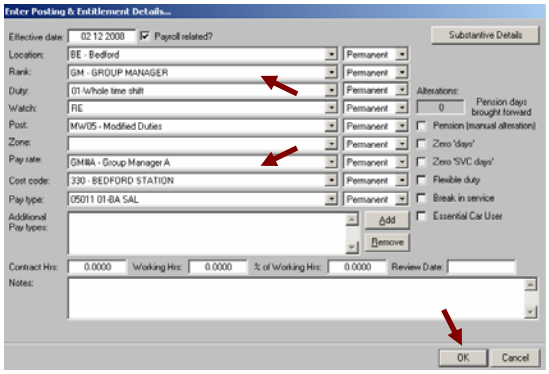


Each Post can have its own Service History, Training Records, Absence, Sickness and other data.

How to create an Additional Post

- Click onto Create Additional Post button

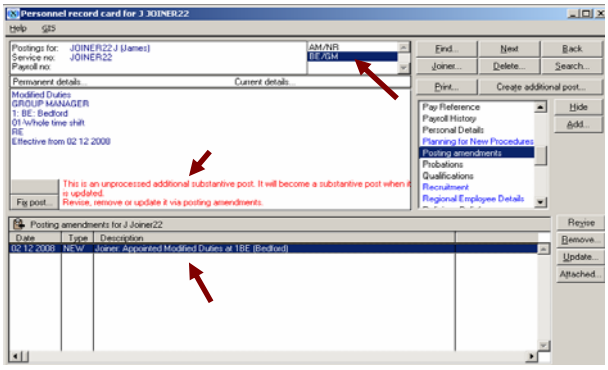
The Posing & Entitlement Details window will appear



- Enter the details of the New Post

Once you have entered the Posting details

- Click onto the OK button

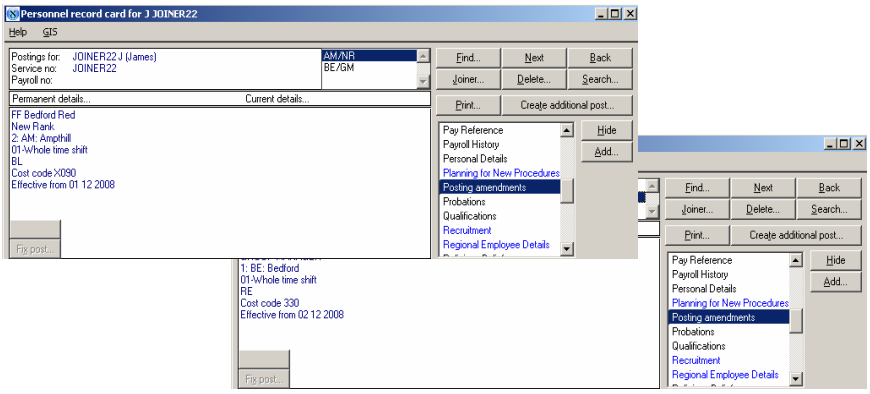


As you can see the Additional Posting has been entered at the top of the screen and the details have changed.

- You need to update the Posing for it to take effect (pg 6)

Click onto Posting Amendments > Click onto the Show button > Highlight the Posting > Click onto the Print button > Click onto the OK button > Click onto the OK button > Click onto the X in the top right hand corner > Click onto the Yes button > Click onto the Update button > Click onto the Yes button > Click onto the OK button. (pg 6)

As you can see both Postings are displayed on to the same person, without having to create another Personnel Record Card (PRC)

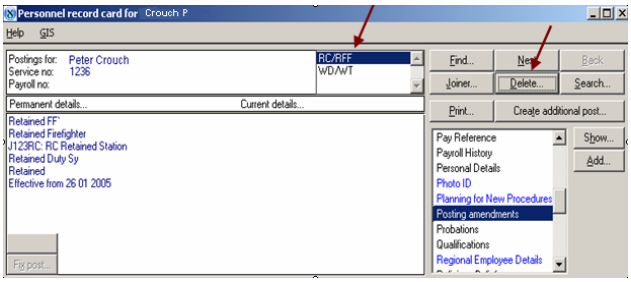


- Click onto each of the postings to see the PRC details change.

How to Delete Additional Post

If you have two posts and need to delete one of the posts

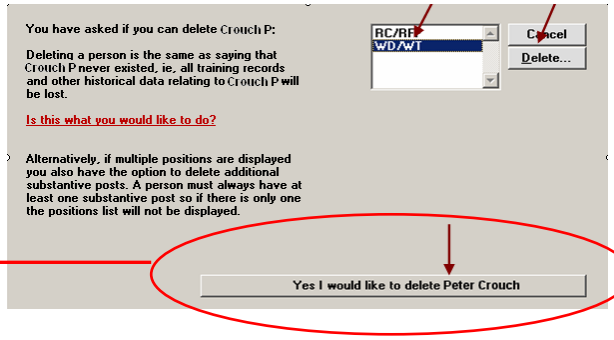
- Click onto the Delete button



- Click onto the post you want to Delete
- Click onto Delete button

DO NOT CLICK ON THE BUTTON AT THE BOTTOM

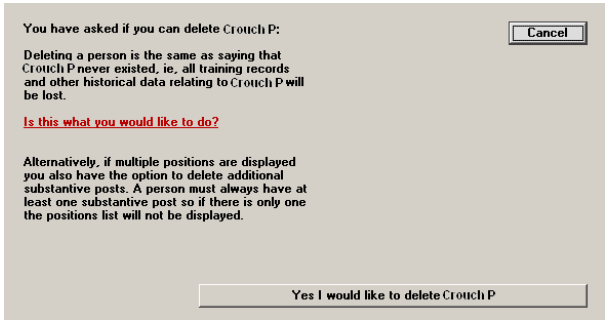
OF THIS WINDOW AS IT WILL….


You have asked if you can delete Crouch P:
Deleting a person is the same as saying that Crouch P never existed, ie, all training records and other historical data relating to Crouch P will be lost.
Is this what you would like to do?
Alternatively, if multiple positions are displayed you also have the option to delete additional substantive posts. A person must always have at least one substantive post so if there is only one the positions list will not be displayed.
RC/RFF
WD/WT
Cancel
Delete...
Yes I would like to delete Peter Crouch

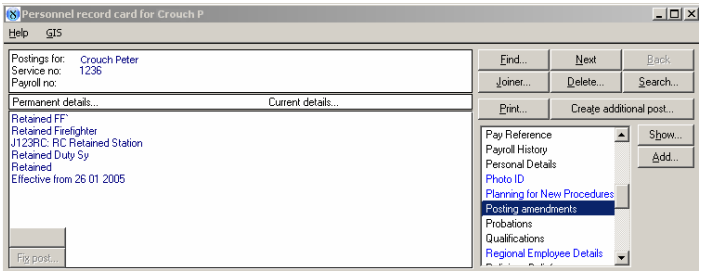
…DELETE THE WHOLE RECORD – FOR GOOD…

Another dialog box will appear asking you if you want to delete the whole record

- Click on Cancel


You have asked if you can delete Crouch P:
Deleting a person is the same as saying that Crouch P never existed, ie, all training records and other historical data relating to Crouch P will be lost.
Is this what you would like to do?
Alternatively, if multiple positions are displayed you also have the option to delete additional substantive posts. A person must always have at least one substantive post so if there is only one the positions list will not be displayed.
Cancel
Yes I would like to delete Crouch P

The Additional Post has now disappeared and the person is back to one Post.

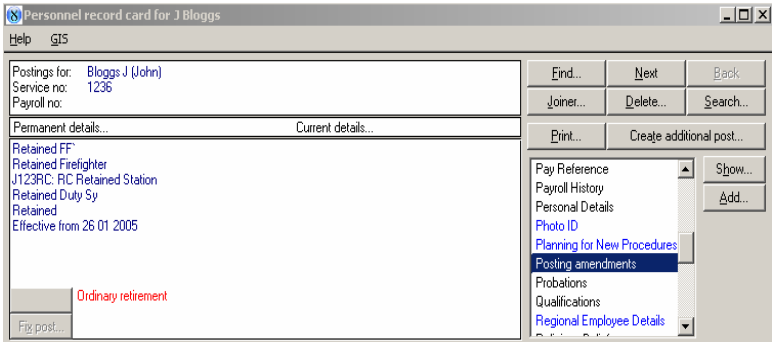


Re-Joined a Person who was Accidentally Entered as a Leaver

If you have 'accidentally' entered a person as a leaver when they are still active… woops!

Not to worry follow the instruction below. ☺

- Find the person you need to amend
- Click onto the Add button

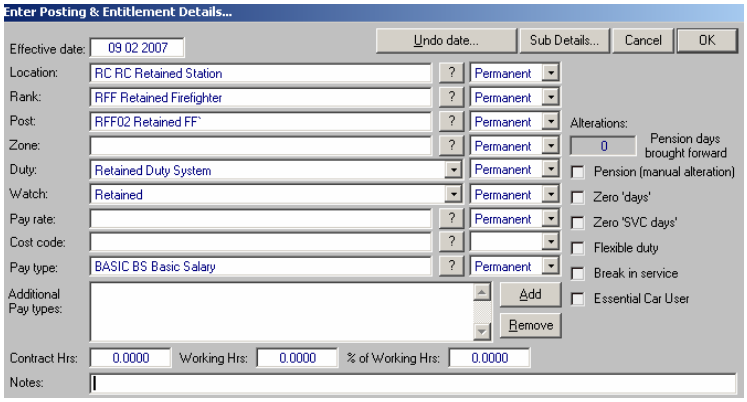


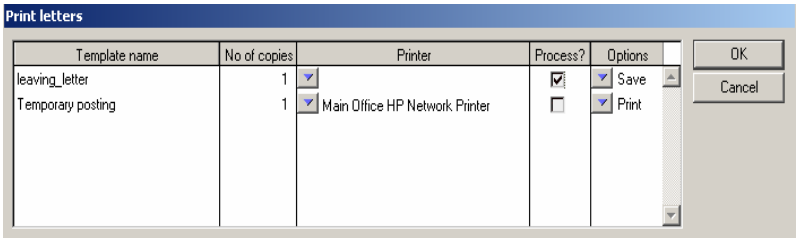
- Click onto Re-Joined Fire Service

The information from the previous post should still be visible

- Enter the date

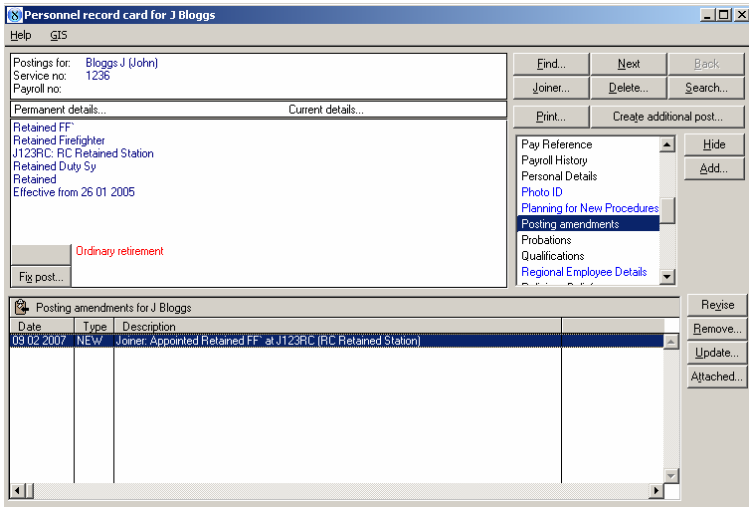
You can enter the same date as when the person was de-activated…



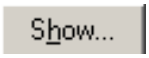


- Select one of the letters
- Click OK

- Click onto the Yes



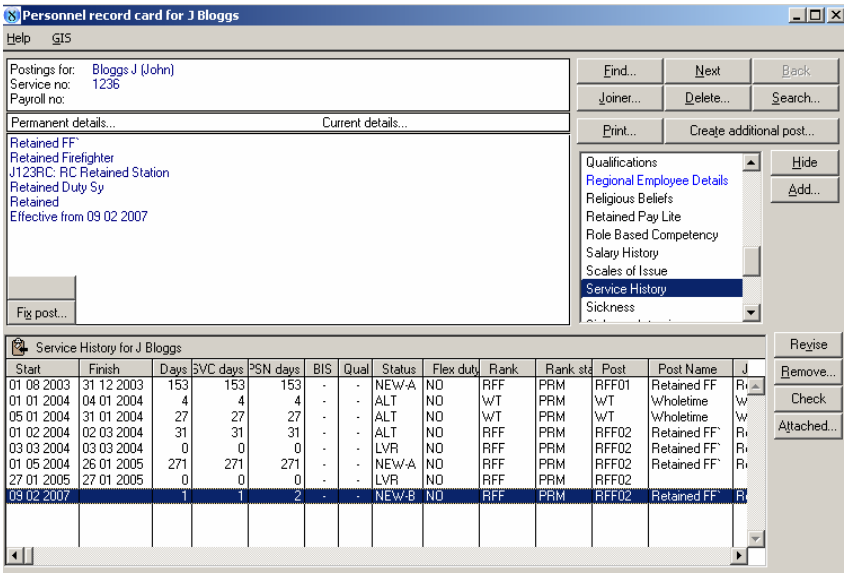
- On the PRC – click onto the show button



Now you need to Update your Posting (next page)

The red writing saying the ‘This person has left this post’ has now disappeared and the person is now; again. active.

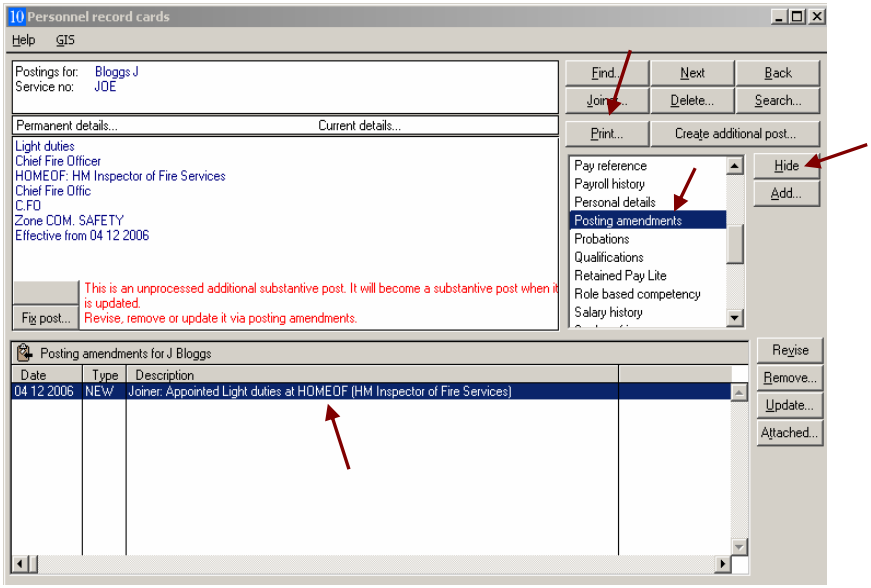
You can view all activities in the Service History sub option



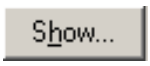
Printing a Posting Amendment

In order to process a Posting Amendment and create the new line of Service History, it must be first printed and then updated – to do this…In the box on the right of your window

- Scroll down the list, until you come to 'Posting Amendments'
- Click onto 'Posting Amendments' – should be highlighted – as shown below.



- Click on the Show button



Notice that the 'Show' button has changed to 'Hide' and that the window has extended.

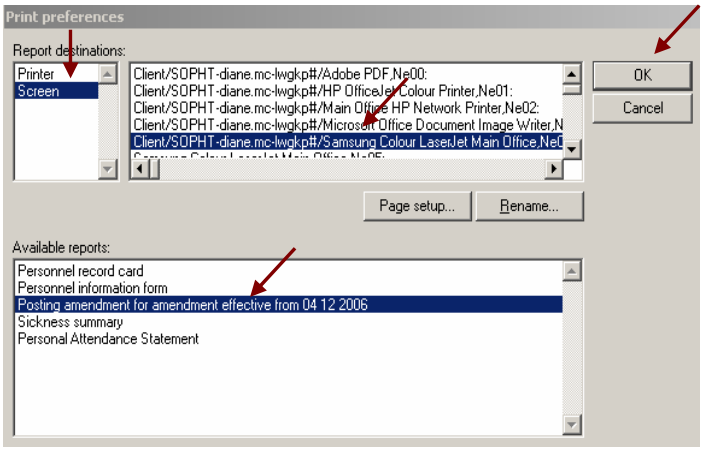
- Click onto the Joiner Appointed
- Click on Print

A Printing preference box will appear, highlighting…

- Screen
- Name of printer
- Document you want to amend

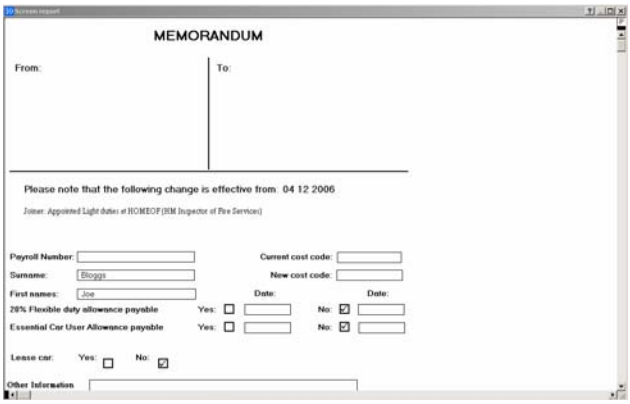
- Ensure that the Posting Amendment line is selected from the available reports and press OK.

- Click OK



This is a preview of the default ‘Post Amendment’ printout

You can also design your own template like the one shown below



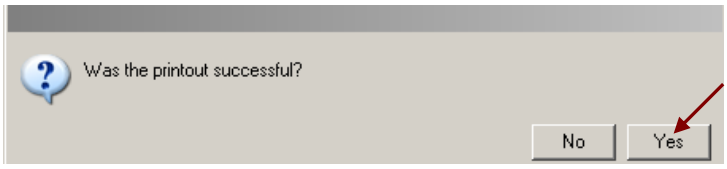
To close this window:

- Click onto the in the top right hand corner

The system will ask whether the print was successful.

You should now see a dialog box confirming that the print was successful

Only if the user selects ‘Yes’ at this point will the print be recorded, allowing the posting to be updated.



- Click yes to close the box